

Seamless Document Integration

A smarter way to access documents in one easy subscription

LEGAL

- Company Incorporation (Standard)
- Company Incorporation (Special Purpose)
- Change of Constitution
- Company Constitution only
- SMSF Establishment (incl. QROPS)
- SMSF Deed Upgrade (incl. QROPS)
- SMSF Change of Trustee
- SMSF Change of Name
- Lost Trust Deed
- Fixed Unit Trust
- Discretionary (Family) Trust
- Limited Recourse Borrowing Arrangement (LRBA)
- LRBA Refinance
- In-house Asset Loan Agreement
- Deed of Debt Forgiveness (coming soon)
- Non-binding DBN
- Binding DBN (incl. non-lapsing and cascading)
- Add non-lapsing BDBN as a Paramount Document
- Fund Member's Guardian
- Add or remove a Fund Member

SMSF COMPLIANCE

- Investment Strategy
- Change allocation of Investment Strategy
- Contribution Reserving – Concessional Contributions
- Contribution Reserving – Non-Concessional
- Downsizer Contributions
- Member contribution (cash and in-specie)
- Contribution splitting
- Satisfy work test and Work Test Exemption
- Met Condition of Release
- Notice to vary LRBA interest rate
- Acquire an Asset Minute
- Dispose of an Asset Minute
- Certificate of Complying Status
- Audit confirmation of employer contributions
- Trustee Consent – Director
- Trustee Consent – Individual
- Winding up a SMSF
- Creation of a Reserve (coming soon)
- Allocation from a Reserve
- Returning due to not meeting work test*

PENSION AND LUMP SUMS

- Pension Commencement (ABP, TRIS and Death Benefit)
- Partial Commutation (Cash & in-specie)
- Lump Sum
- Rollback of Pension (ABP & TRIS)
- TRIS to Retirement Phase
- Lost Pension Deed (Affirmation & Confirmation)
- Annual Pension Review - incl. above minimum pension amounts
- Add ABP as a Special Rule of the Fund
- Minimum Pension Shortfall
- Met condition of release
- Add or remove a reversionary beneficiary of a pension
- Audit Confirmation of Benefits Paid
- Payment of Reversionary Pension
- Deemed Segregation Period (DSP)
- Death of a Member *
- Market Linked Pension (MLP) *
- MLP Commutation *

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More features to come:
Annual Trust Deed Update
Unlicensed Accountant Letters

* available as document template only

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 smarter smsf

Simple + Smart

You can now purchase SMSF and company documents directly in Simple Fund 360 and CAS360.

This new service will simplify your life and save you a huge amount of time and money!

How it works

- Simply determine the number of documents you would use annually;
- Select the monthly subscription package that suits the size of your business;
- Start ordering from our list of documents available, using our seamless two-way integration with Simple Fund 360 and CAS 360;
- Your BGL data automatically populates your order to generate the documents;
- Your document can then be automatically loaded into your BGL software.

Smarter SMSF Document Bundles

	Starter25	Simple50	Smart100	Smarter250	Smartest500
No. of docs per annum	25	50	100	250	500+
Monthly subscription	\$150	\$250	\$450	\$750	\$1,250
Price per doc	\$72	\$62	\$54	\$36	\$30
Webinars + Training	No	No	No	Yes	Yes

Please note all subscription charges are monthly subscriptions on a minimum 12 month contract.

All prices exclude GST and excludes ASIC fee. For more information, demo videos and full T's & C's, please visit our website.



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